

SAMPLE PSP COVER SHEET

Provider Service Plan
Contract Year (mm/dd/yy)
Provider Customer Service Program

Contractor Name
Contractor Number
Contractor Type (Carrier, FI, DMERC or MAC)
Contractor Address
Contractor Web Address

Regional Office Contact
Regional Office Affiliation by Name and Regional Office #

PSP Coordinator: Name, Title
Telephone number
E-mail address

Provider Service Plan
Carriers / Fiscal Intermediaries / DMERCs / MACs

Background

Medicare Contractors are required to prepare and submit a Provider Service Plan (PSP) annually. The PSP must outline the strategies, projected activities, efforts, and approaches each contractor will use during the forthcoming year to support provider education and communications. The PSP should also include an evaluation of the strengths and weaknesses of the previous contract year's Provider Outreach and Education (POE) work, as well as how the findings from that evaluation were incorporated into the forthcoming year's educational plan. The PSP must address and support all the implementation strategies and activities stated in IOM 100-09, Chapter 6, § 20 as well as all required activities stated in the yearly Budget and Performance Requirements (BPRs) and Statements of Work (SOW). For the purposes of this report, the term "provider" refers to any organization, institution, or individual that offers health care services to Medicare beneficiaries including suppliers.

Your plan should not be a restatement of the question but should be sufficiently detailed for CMS to be able to understand your education strategy and program needs in relation to your ongoing budget. Contractors who merely restate the questions in this document will have their PSP returned to them as non-responsive and will be deemed as not meeting the annual requirement.

The plan must address the following elements of the PCSP and include descriptions of activities planned:

- A. Provider Data Analysis**
- B. Education Events**
- C. Development of Materials**
- D. Provider Education Technology**
- E. Partnering with External Entities**
- F. Provider Outreach and Education Advisory Group (POE AG) and "Ask-the-Contractor" Teleconferences" (ACTs)**
- G. Internal Development of Provider Issues**
- H. Internal Staff Development and Training**
- I. Other POE Activities**

A. Provider Data Analysis

1. Provider Demographic Analysis

- a. Please provide the number of active* providers you serve. Include, in your response, a breakdown by provider type/specialty (e.g. physician, NPP, SNF, ESRD facilities, suppliers, CAH, hospice, ambulance, etc.).
- b. Describe how the information above influences the development of your provider education plans.
- c. Will any of these provider types/specialties require specialized education? If yes, which types/specialties, and what specialized education do you plan to provide?
- d. Describe any other unique characteristics of your provider community that impact your education plans. How has this affected your education plan?

***An active provider is any provider who has had billing activity within the last 12 months.**

2. Inquiry Analysis (Telephone and Written Correspondence)

- a. Summarize how you maintain a systematic and reproducible provider inquiry analysis program that produces a monthly list of the most frequently asked questions (FAQs) beyond claims status and eligibility for telephone inquiries and written inquiries.
- b. Describe how you will incorporate your findings into your plans to educate providers and suppliers based on areas identified by the inquiry analysis program.
- c. Provide examples of how you incorporated the findings from your inquiry analysis program into your overall education plan during the previous year. Did you make any changes to your inquiry analysis process based on your experience during the previous year?

3. Claims Submission Data Analysis

- a. Describe how you plan to use the provider data analysis program to generate a monthly list of the most frequent claims submission errors from providers/suppliers. How will this data be used to develop education and outreach activities?
- b. Summarize how analysis of Comprehensive Error Rate Testing (CERT) will be incorporated into your overall education plan. Fiscal Intermediaries

should summarize their collaborations with their state Quality Improvement Organizations to reduce the Hospital Payment Monitoring Program (HPMP) error rates.

- c. Provide examples of how you incorporated the findings from your claims data analysis program into your overall education plan during the previous year. Did you make any changes to your claims submission data analysis process based on your experience during the previous year?

B. Education Events

- a. Describe your plans for holding seminars, workshops, trainings, teleconferences or other face-to-face meetings to educate and train providers about Medicare policies and billing issues, including training tailored for small providers.
- b. Please provide a tentative schedule of events to be held for the upcoming year by event type, date, location, and subject.
- c. What mechanism(s) do you plan to use in the upcoming contract year to evaluate education events?
- d. In evaluating the type and frequency of education events over the last contract year, what education events were your most and least successful? Why?
- e. Besides budget constraints, are there challenges to holding additional education events? Please explain if you have any solutions to alleviating these challenges.

C. Development of Materials

1. Bulletins and Newsletters

- a. Summarize your plans for developing and disseminating bulletins and/or newsletters including the frequency for which the bulletins/newsletters will be produced and distributed.
- b. For those contractors who have chosen not to participate in the e-bulletin initiative please provide your rationale for why you are still printing and mailing hard copy bulletins. Also, include any plans for encouraging providers to obtain electronic copies of bulletins/newsletters and other notices through your Web site.

2. Educational Materials

- a. Discuss the educational resources (i.e., brochures, manuals, work and reference books, fact sheets, videos, audio tapes, CDs etc.) that will be made available for providers. Also discuss any plans to produce new provider education material or significantly revise existing ones.
- b. Discuss any feedback you received regarding your education materials in the previous contract year. Also, explain any changes you implemented as a result of this feedback. Are there any educational resources that you consider non-effective and will no longer be using in your education efforts?

D. Provider Education Technology

1. New Technologies including Expanded Use of Provider Self-Service

- a. Summarize how you will use new technologies, electronic media, and Internet educational offerings (e.g. web casting, web-based conferencing and web-based training) as an efficient, timely and cost-effective means of disseminating Medicare provider/supplier information.
- b. Provide information on any planned web enhancements.
- c. Discuss how you plan to educate and encourage the use of self-service technology (e.g., use of CMS and contractor Internet websites, web pages, listservs, IVRs, etc.).
- d. Discuss the process you will use to evaluate comments gained from the feedback mechanism on your website.
- e. For contractors who participate in the Website Satisfaction Survey, what changes have been made, if any, to your website as a result of survey findings? What changes, if any, do you anticipate making? Do you find the survey tool helpful/useful?
- f. Discuss any feedback you received regarding any new technology or Internet offerings provided in the previous contract year. Also, explain any changes you implemented as a result of this feedback.

2. Electronic Mailing Lists/Listserv(s)

- a. Summarize how providers/suppliers will be encouraged to sign-up for your listserv(s). What efforts will be taken to actively market and promote

to the provider/supplier community the advantages and benefits of being a member of your listserv(s)?

- b. Discuss any feedback you received regarding efforts to increase listserv participation in the previous contract year. Also, explain any changes you implemented as a result of this feedback.

E. Partnering with External Entities

- a. Provide the names of the organizations that you plan to work with in the upcoming fiscal year and what you hope to accomplish by working with them.
- b. Describe a few examples of the accomplishments achieved in collaborating with external entities during the previous contract year.

F. Provider Outreach and Education Advisory Group (POE AG) and “Ask-the-Contractor” Teleconferences” (ACTs)

1. Provider Outreach and Education Advisory Group (POE AG)

- a. Describe how you ensure that your POE AG truly acts as a consultant resource that identifies salient provider education issues, and recommends effective means of information dissemination to all appropriate providers and their staff.
- b. What strategies will you use in the upcoming year to market the POE AG and ensure that the group’s composition reflects your most active provider types?
- c. Discuss the mechanisms you plan to use to evaluate and possibly implement POE AG suggestions and issues raised.
- d. Supply samples of suggestions from previous Advisory Group meetings that were incorporated into your overall education plan.

2. “Ask-the-Contractor” Teleconferences” (ACTs)

- a. Discuss the mechanisms you plan to use to evaluate and possibly implement suggestions and issues raised during the ACT.
- b. What strategies will you use in the upcoming year to market the ACTs to your provider community?

- c. Supply samples, if any, of suggestions or issues from “Ask-the-Contractor” Teleconferences that were incorporated into your overall education plan (for those contractors who held ACTs in the previous year).

G. Internal Development of Provider Issues

- a. What processes are in place to ensure coordination and collaboration with the Medical Review staff for education referrals?
- b. Summarize how you plan to work with the various departments within your organization, like the Provider Contact Center, to exchange information about provider issues. Discuss your plans to resolve any issues, and ultimately incorporate this information into your education activities.
- c. What key issues, if any, were brought to your attention by other areas in your organization during the previous contract year that led to education efforts?

H. Internal Staff Development and Training

- a. What are your training goals for the year for new and existing Provider Outreach and Education staff? What evaluation mechanisms will be used to gauge the training needs of this staff?
- b. What evaluation mechanisms will be used to measure the effectiveness of the training provided?
- c. Describe any successes and/or failures of the training plan used in the previous contract year.
- d. Discuss your involvement, if any, with the development and dissemination of new hire and ongoing training of Customer Service Representatives (CSRs), written correspondents, and Provider Relations Research Specialists (PRRS).

I. Other Provider Outreach and Education Activities

Describe any additional POE activities or efforts, not previously discussed, that you plan to undertake in the upcoming contract year.